Implementing Adobe Sign

1. Define your objectives and business goals

1a. Define project objectives
Specify what you are trying to achieve, how you will achieve it and how you will define success for your project.

1b. Review business processes
To get an idea of what business processes can be transformed, review how leading companies are using e-signatures.

Resources
- How leading companies are using Adobe Sign
  - Adobe Sign customer showcase
- How Adobe uses Adobe Sign
  - HR, Legal and Procurement
- How to get started
  - Biweekly Adobe Sign: Ask Me Anything Webinars

2. Build your implementation team
Your onboarding specialist will help you select the members of your implementation team—from your organization and Adobe.

Resources
- Adobe Customer Success services can help you get started
  - Adobe Document Cloud Customer Success datasheet

3. Select, prioritize and transform business processes

3a. Select and prioritize business processes
Prioritize your list of business processes to determine phasing and targeting. Identify a straightforward business process that can be quickly and easily transformed.

3b. Transform business processes
Map your current business process workflow into a digital workflow.

Resources
- Best practice: Workflows
  - Migrating workflows from paper to digital
- Best practice: Templates
  - How to create forms with text tags
- Best practice: Integration
  - Adobe partner integration reference guides

3c. Identify success metrics
Define the metrics that will be used to determine the success of your project.

Resources
- Success metrics tool
  - Resource Saver Calculator

4. Develop your implementation plan

4a. Implementation strategy
Specify the phasing, schedule, scope, audiences and/or geographies of the rollout. Include plans for communications, training and end-user support.

Resources
- Adobe Sign API
  - Adobe Sign API Guide
- Best practice: Implementation strategies
  - Creating an Effective Deployment Strategy for Adobe Sign
- How to get started
  - Biweekly Adobe Sign: Ask Me Anything Webinars
- Implementation strategies of leading companies
  - Customer success stories
- Adobe success stories:
  - HR, Legal and Procurement
- System integrations with Adobe Sign
  - List of the business system integrations
  - Adobe partner integration reference guides
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4b. Communication plan
Identify the target audiences you need to communicate with and the most effective communication channel for each audience.

Resources
- Learning about e-signatures
  - Adobe Sign website
  - Adobe Sign FAQ
- Best practice: Developing a communication plan
  - Creating an effective deployment communication plan

4c. Training plan
Provide users with a clear understanding of the overall changes to the business process, and why the new workflows will help speed your implementation project. The key steps are: train your program team, identify additional audiences to train and provide a variety of training resources.

Resources
- Developing a training plan
  - On-demand training videos
  - Adobe Sign online help
  - Adobe Sign reference guides
  - 5 steps to developing an effective training plan
  - Adobe Sign: Ask Me Anything Webinars
  - Quarterly best practice-focused webinars via email invitation

4d. Support plan for end user
Provide a plan for timely responses to any issues or questions that may arise. Include a broad range of self-service tools and in-person support.

4e. Integrated implementation plan
Combine your training, communication and support plans into one comprehensive rollout plan. Include regular check-in meetings, milestones and metric measurements.

5. Implement your project
Hold regular status meetings to track detailed plan execution, measure progress and execute course corrections, if needed.

Build on your momentum
Once you have implemented your first e-signature project, the following steps will help spread e-signatures throughout your organization.

Expand on your success
Regularly measure and record progress—Track the success metrics you defined in the beginning of the project.

Determine lessons learned—Gather input from users and stakeholders.

Celebrate success—Share your success with e-signatures with other groups and departments using the Adobe Sign Share Your Success kit. Gather feedback to identify other areas that could benefit from e-signatures.

Resources
- Best practice: Sharing the benefits of e-signatures throughout your organization
  - Adobe Sign Share Your Success kit

Looking forward
Continue to build your rollout plan to ensure continued adoption and success of e-signatures at your organization. As you roll out e-signatures throughout your company, build on your success by creating an e-signature infrastructure:

- Create an e-signature system architecture—Consolidate all lines of business, business processes and geographies, and critical systems your organization integrates with.
- Create an Adobe Sign center of excellence—Track the success and use of e-signatures in your organization.
- Create an effective e-signature policy—Your legal department can create a master signature policy to help guide your organization’s efforts.
- Define a data retention policy—Your legal department can examine and define your organization’s data retention policy.

Resources
- Best practice: Creating an e-signature policy
  - Developing an effective electronic signature policy
- Best practice: Defining a data retention policy
  - Adobe Sign Document Retention